



SETUP GUIDE

Moxo for HubSpot

Turn CRM events into running client workflows — and keep HubSpot current without anyone re-typing.

Applies to

Moxo — all workspace plans that include Connected Apps

HubSpot

Contacts, companies and deals on any account. Tickets need Service Hub.

Support

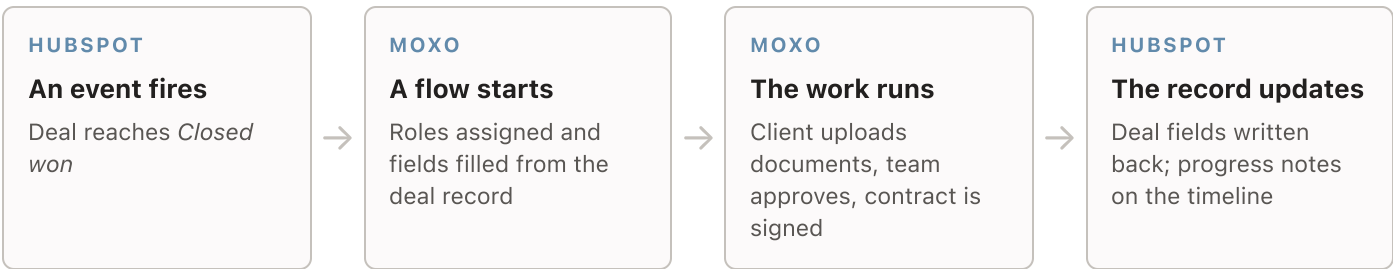
support@moxo.com

1 Introduction

Moxo is a workflow platform for client-facing work — onboarding, document collection, approvals, reviews and signatures. The HubSpot integration wires that work to your CRM, so a record in HubSpot can start a workflow, a running workflow can read and write HubSpot records, and the account team can follow progress without leaving the CRM.

What you can do with it

- **Start a Moxo workflow automatically from a HubSpot event.** A new contact, a new deal, a deal moving stage, a new or reassigned ticket, or a change to any property on a record you choose — each can launch the right workflow with CRM data already mapped into it. No manual handoff between sales and delivery.
- **Read and write HubSpot from inside a running workflow.** Sixteen actions cover contacts, companies, deals and tickets — create, update, look up, link records to each other, log an activity, and attach collected files straight to a record. The CRM stays current as a by-product of the work.
- **Report flow progress back onto the HubSpot record.** A daily note on the deal, ticket, company or contact summarises what happened — steps completed, approvals, documents signed — so "where is onboarding up to?" is answered on the record itself.
- **Use CRM data anywhere in the workflow.** Fields you map from HubSpot are available to every later step — to address an email, route an approval, set a due date, or brief an AI step.



In this guide

2	Install the app	Prerequisites, connecting, permissions
3	Configure the app	Triggers, actions, field mapping, data sync
4	Use the app	A worked example, end to end
5	Disconnect the app	In Moxo, and what happens to your data
6	Uninstall the app	In HubSpot, and what happens to your data
7	Troubleshooting & support	Common issues and how to reach us

2 Install the app

Installation starts in Moxo. Moxo signs the authorization request that sends you to HubSpot, so begin from the Connected Apps page in your Moxo workspace rather than from the HubSpot marketplace listing.

Before you begin

In Moxo	A workspace on a plan that includes Connected Apps, and a user with permission to install integrations. If you can open Settings → Connected Apps , you have it.
In HubSpot	An account where you can approve OAuth scopes — a Super Admin, or a user granted app-install rights.
For ticket features	Service Hub. Without it, HubSpot cannot grant the ticket scopes; the install still succeeds and ticket actions and triggers are hidden.
For custom objects	A HubSpot edition that includes custom objects. Without it, standard objects still work everywhere.

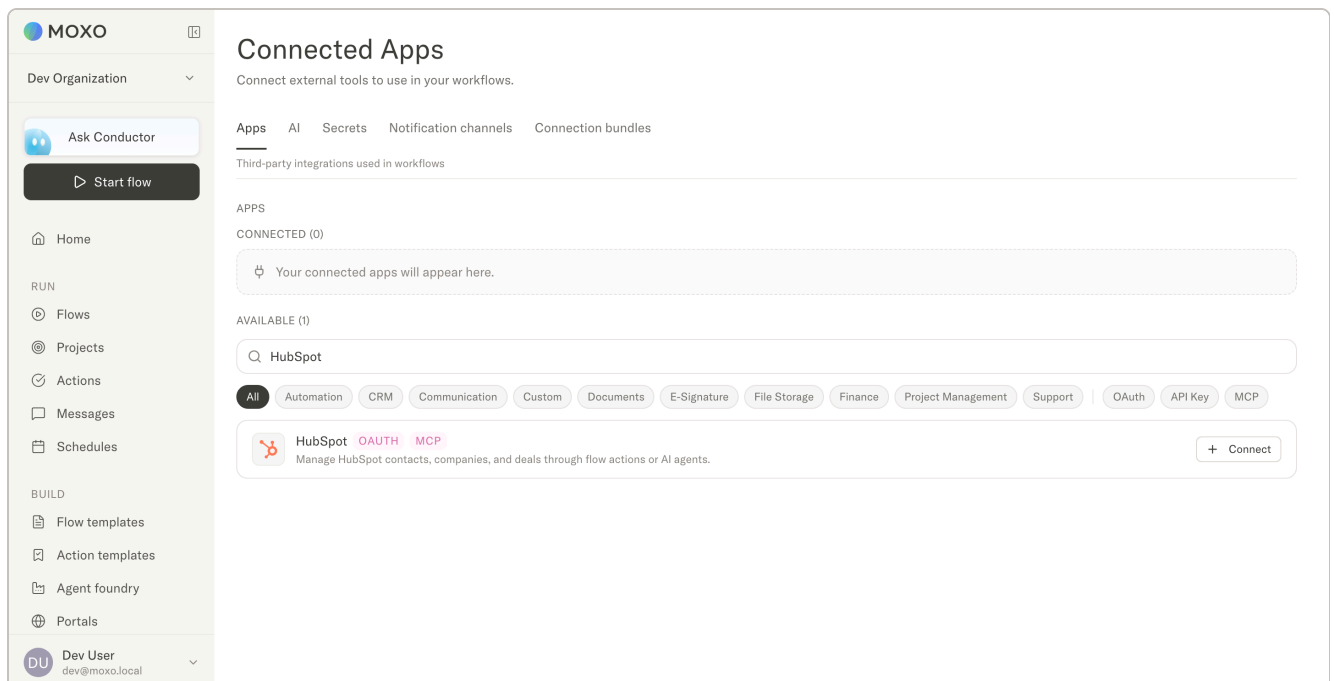
Connect your HubSpot account

1 Open Connected Apps in Moxo

Sign in to your Moxo workspace and go to **Settings → Connected Apps**. The **Apps** tab lists what you have connected, above everything available to connect.

2 Find HubSpot and click Connect

HubSpot sits under **Available** in the CRM category — or search for it.



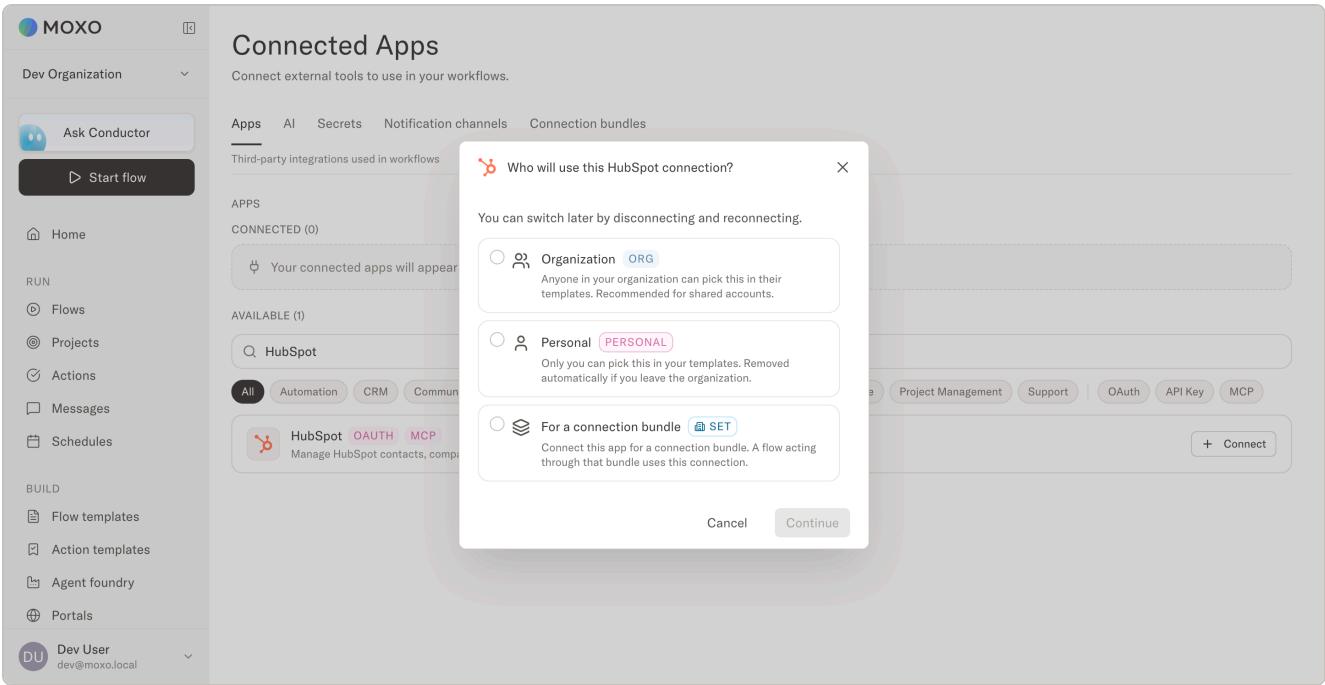
Settings → Connected Apps. Your existing connections sit above the catalogue of everything available to connect.

3 Choose who the connection belongs to

Moxo asks who will use it. Nothing is preselected — pick one, then **Continue**.

- **Organization** — anyone in your workspace can pick it in their templates. This is the right choice for shared CRM automation.
- **Personal** — only you can pick it, and it is removed automatically if you leave the organization.
- **For a connection bundle** — for the case where an operator chooses which account a flow runs against when they start it.

The choice is fixed once the connection is made; to switch, disconnect and reconnect.



Organization is the usual answer. Data sync (section 3.3) requires it.

4 Approve the scopes in HubSpot

HubSpot opens its own consent screen. Pick the HubSpot account you want to connect, review the permissions Moxo is asking for, and click **Connect app**. The permissions are listed in full below.

5 You are returned to Moxo

The window closes and HubSpot now appears under **Connected**, showing which HubSpot account it points at. Use **Test** on the row at any time to confirm the connection is still live.

Permissions Moxo requests, and why

Every scope below is used by a feature described in this guide. Moxo requests no scope it does not call.

Scope	Required	What it is used for
crm.objects.contacts.read	REQUIRED	Find, create and update contacts; read contact data that starts a flow or fills its fields.
crm.objects.contacts.write		

Scope	Required	What it is used for
crm.objects.companies.read crm.objects.companies.write	REQUIRED	Create and update companies, and read company data associated with a triggering record.
crm.objects.deals.read crm.objects.deals.write	REQUIRED	Create, update and look up deals; read deal and pipeline data for deal triggers.
crm.schemas.contacts.read crm.schemas.companies.read crm.schemas.deals.read	REQUIRED	List the properties on each object so you can pick standard <i>and</i> custom fields from a dropdown when configuring a step, a filter or a field mapping. HubSpot keeps property metadata behind a separate scope from record data.
oauth	REQUIRED	Identify which HubSpot account the connection belongs to, and power the Test button.
crm.objects.tickets.read crm.objects.tickets.write crm.schemas.tickets.read	OPTIONAL	Ticket actions and ticket triggers. Requested optionally so accounts without Service Hub can still install; when they are not granted, the ticket features are simply not offered.
crm.objects.custom.read crm.schemas.custom.read	OPTIONAL	Offer your custom objects — and their properties — as trigger sources and mappable fields. Not granted, standard objects still work.

If you connected before a scope was added

Moxo shows a **Reconnect** prompt on the connection when it needs a permission your existing token does not carry. Reconnecting re-runs the consent screen and keeps everything you have already configured.

3 Configure the app

There is nothing to configure on the connection itself — it is ready as soon as it is made. Configuration happens where you use it, in a Moxo template. There are three places, and they are independent: use one, two or all three.

3.1

Start a flow from HubSpot

Template builder → Flow start → Connected app

3.2

Read & write HubSpot in a step

Template builder → add an External app step

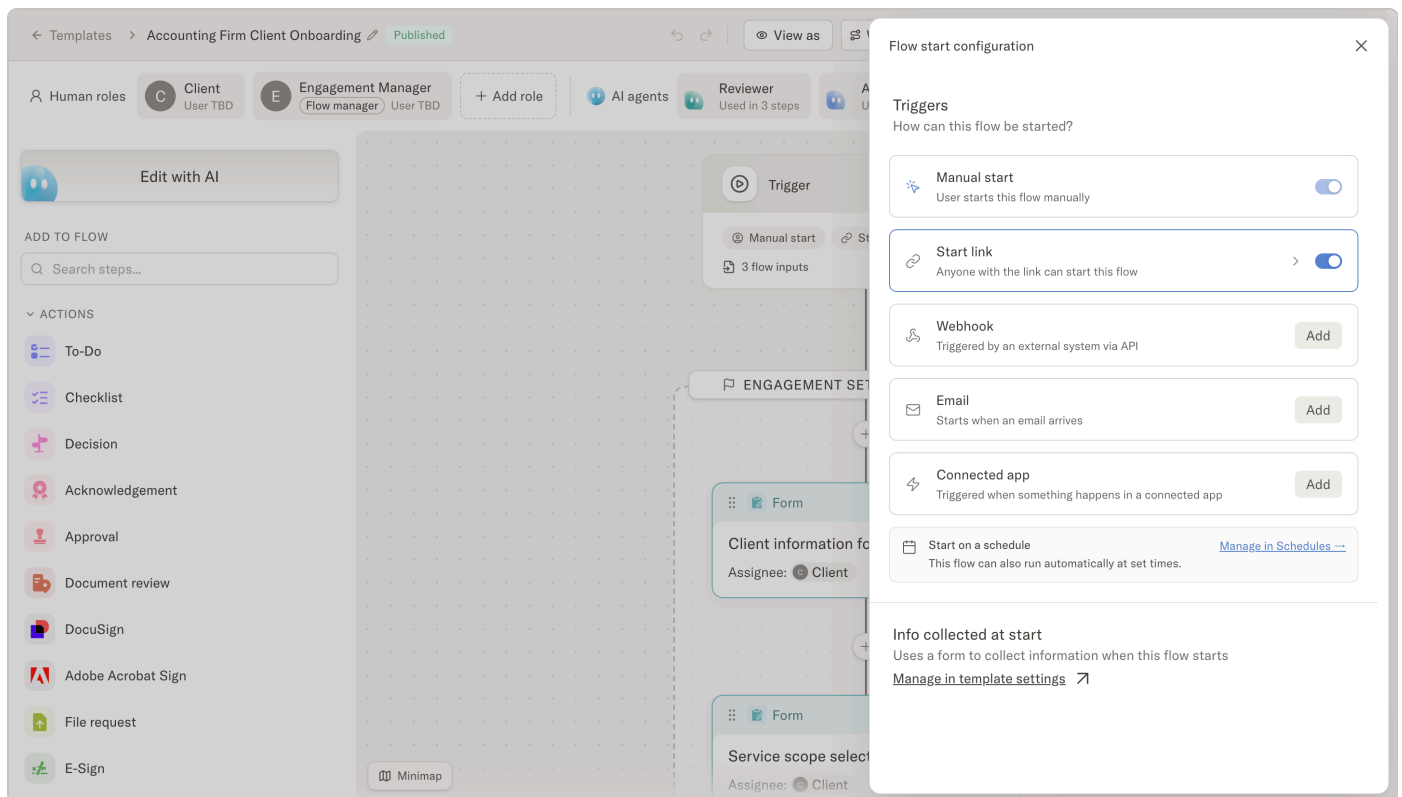
3.3

Post progress back to a record

Template settings → HubSpot data sync

3.1 Start a flow from a HubSpot event

Open a template in the builder, go to **Flow start**, and click **Add** on the **Connected app** row. A two-step wizard opens.



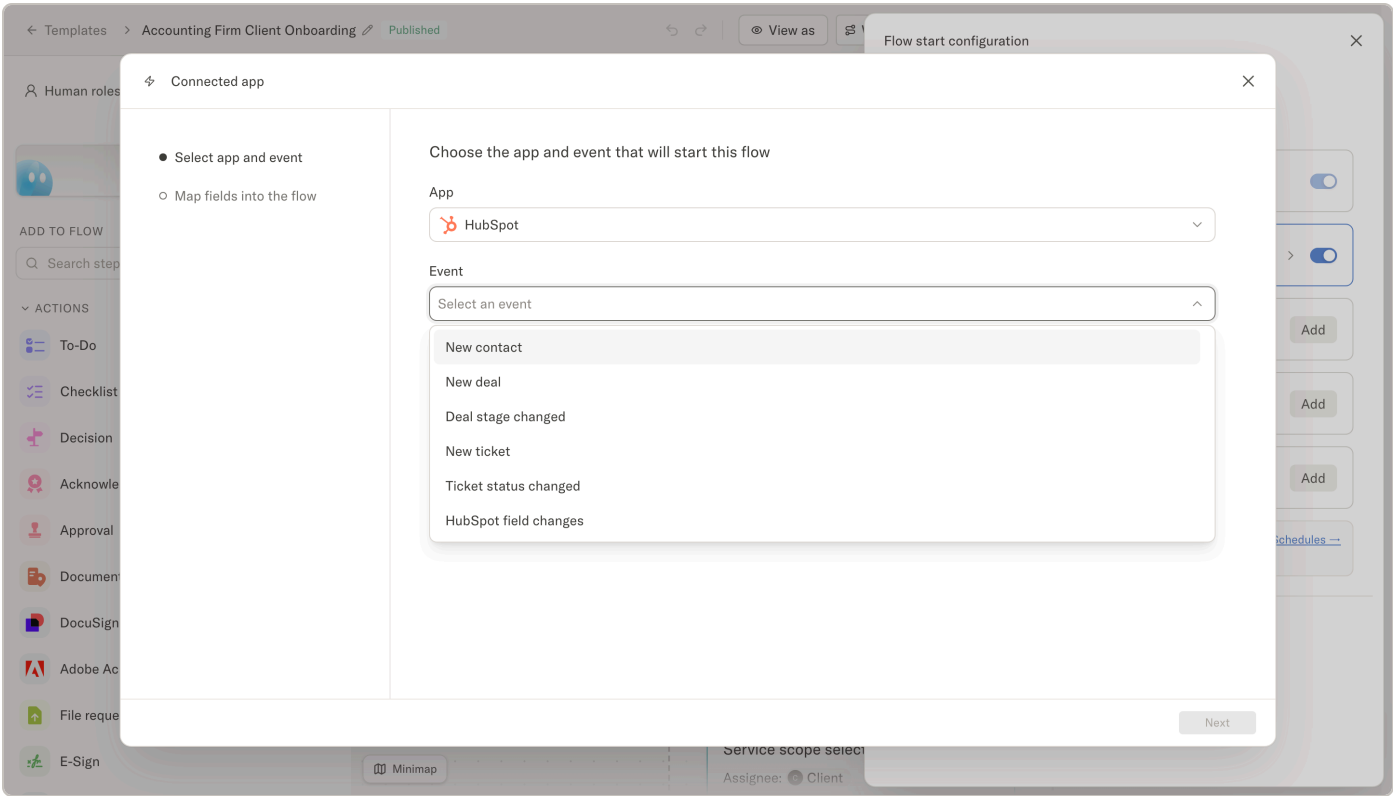
Flow start configuration. A template can hold several app triggers at once — HubSpot *New deal* and HubSpot *Deal stage changed* can both start the same flow.

Step 1 — Choose the event

- **App** — HubSpot.
- **Account** — the connection you made in section 2. If there is only one, it is chosen for you.

- **Event** — one of the six below.
- **Conditions** **OPTIONAL** — only start the flow when the record matches. Build a nested *match all / match any* tree: pipeline and stage, or any property with a type-aware operator (is / is not / is any of, greater than, between, contains, starts with, is set, is empty). Leave it empty to fire on every event.

Event	Fires when
New contact	A contact is created in HubSpot.
New deal	A deal is created.
Deal stage changed	A deal moves to a different stage in its pipeline.
New ticket	A support ticket is created. <i>Needs the ticket scopes.</i>
Ticket status changed	A ticket moves to a different status in its pipeline. <i>Needs the ticket scopes.</i>
HubSpot field changes	Any standard or custom property changes on an object you pick — Company, Contact, Deal, Ticket, or one of your custom objects. Choose a specific property, or Any field .



Step 1 of the wizard. Pick the app, then the event, then the HubSpot account the trigger listens to.

Choosing “Any field”

It is deliberately noisy — every property edit on that object starts a flow. Moxo shows a volume warning when you pick it. Prefer a named property, or add conditions.

Step 2 — Map HubSpot fields into the flow

This is where CRM data becomes flow data. Every value can mix plain text with field references written as `{Object / Field}` — pick them from the dropdown rather than typing them.

Mapping	What to put there
Flow name REQUIRED	How the flow is labelled in Moxo. Mix text and fields — <code>Onboarding — {Company / Name}</code> .
Flow owner REQUIRED	An email address, usually the record owner — <code>{Deal / Deal owner email}</code> . It is matched to a user in your Moxo workspace; if nothing matches, the template's creator owns the flow.
Role assignments	One row per role in the template (Client, Reviewer, ...), each an email address such as <code>{Contact / Email}</code> . A matching Moxo user or contact is assigned; an unrecognised address is added as a new contact so the flow can still reach them.
Pass extra data	Fill the template's own input fields from the record. Pick the field on the left, map the HubSpot value on the right. These appear in the flow as <code>{Inputs / Field name}</code> .
Trigger fields	Any other CRM fields you want available later in the flow. They become <code>{Trigger / Object / Field}</code> and can be used by any step — an email body, an approval rule, a due date, an AI step's brief.

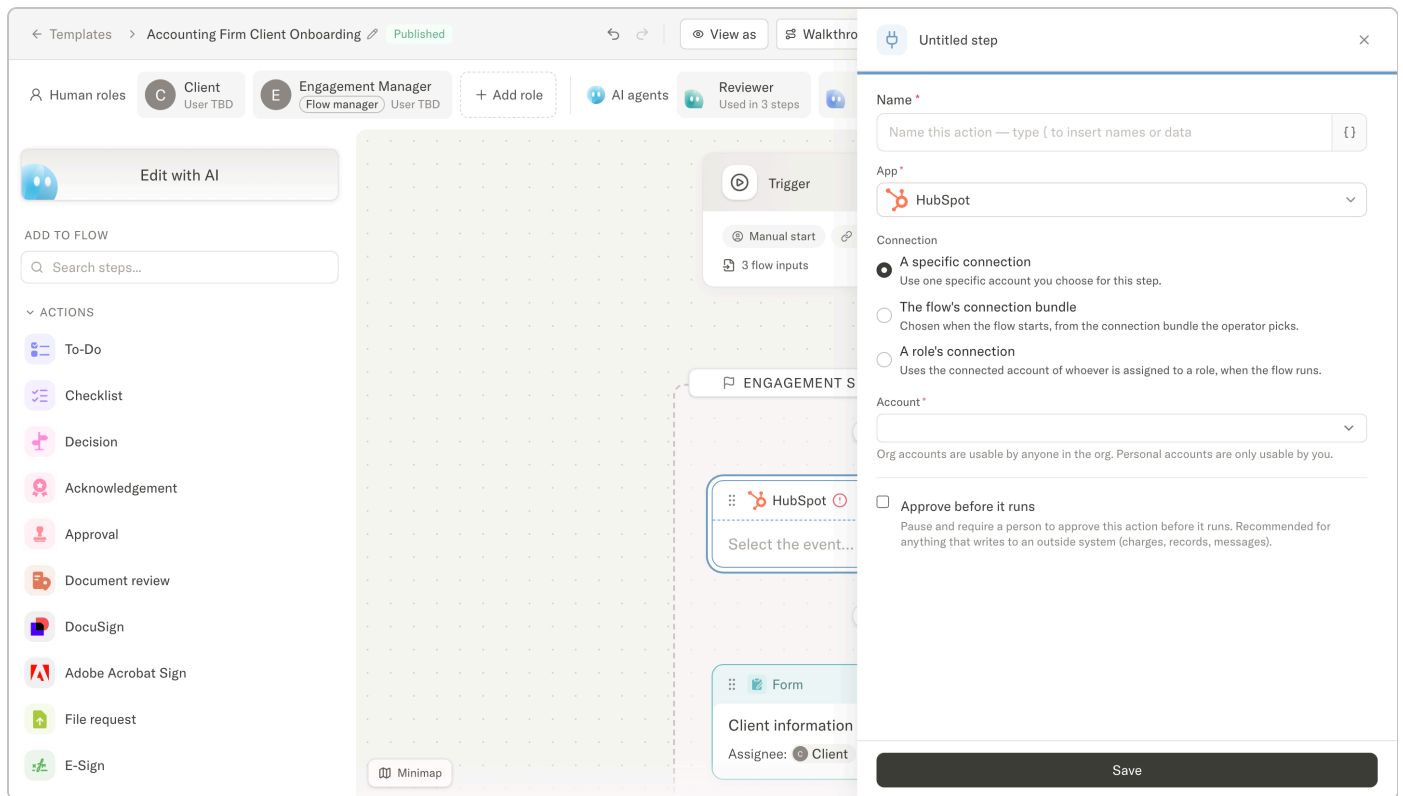
For a field-change trigger you can also map **associated** records — the contacts, companies, deals, tickets and custom objects linked to the record that changed — so a deal trigger can address the client contact by email without a second lookup.

Check your mapping before you publish

Click **Load sample** in step 2. Moxo reads a real record from your connected account — the most recently modified one, or paste a record ID to choose it — and shows exactly what each mapping resolves to, including associated records and custom properties.

3.2 Read and write HubSpot from inside a flow

Add an **External app** step to a template, pick **HubSpot**, then pick an action. Fill the action's inputs with text or references to earlier steps' data, exactly as in the trigger mapper. Whatever the action returns — a deal ID, a created date, a list of deals — is available to every step that follows.



The step's configuration panel. Approve before it runs is worth knowing about: it pauses the flow for a person to approve before the step writes anything to HubSpot.

Which HubSpot account the step uses

Each step answers this itself, so one template can serve several accounts:

- **A specific connection** — one account you choose now. The usual choice.
- **The flow's connection bundle** — chosen when the flow starts, from the bundle the operator picks.
- **A role's connection** — the connected account of whoever is assigned to a role, resolved when the flow runs. This is how a personal HubSpot connection gets used without anyone sharing credentials.

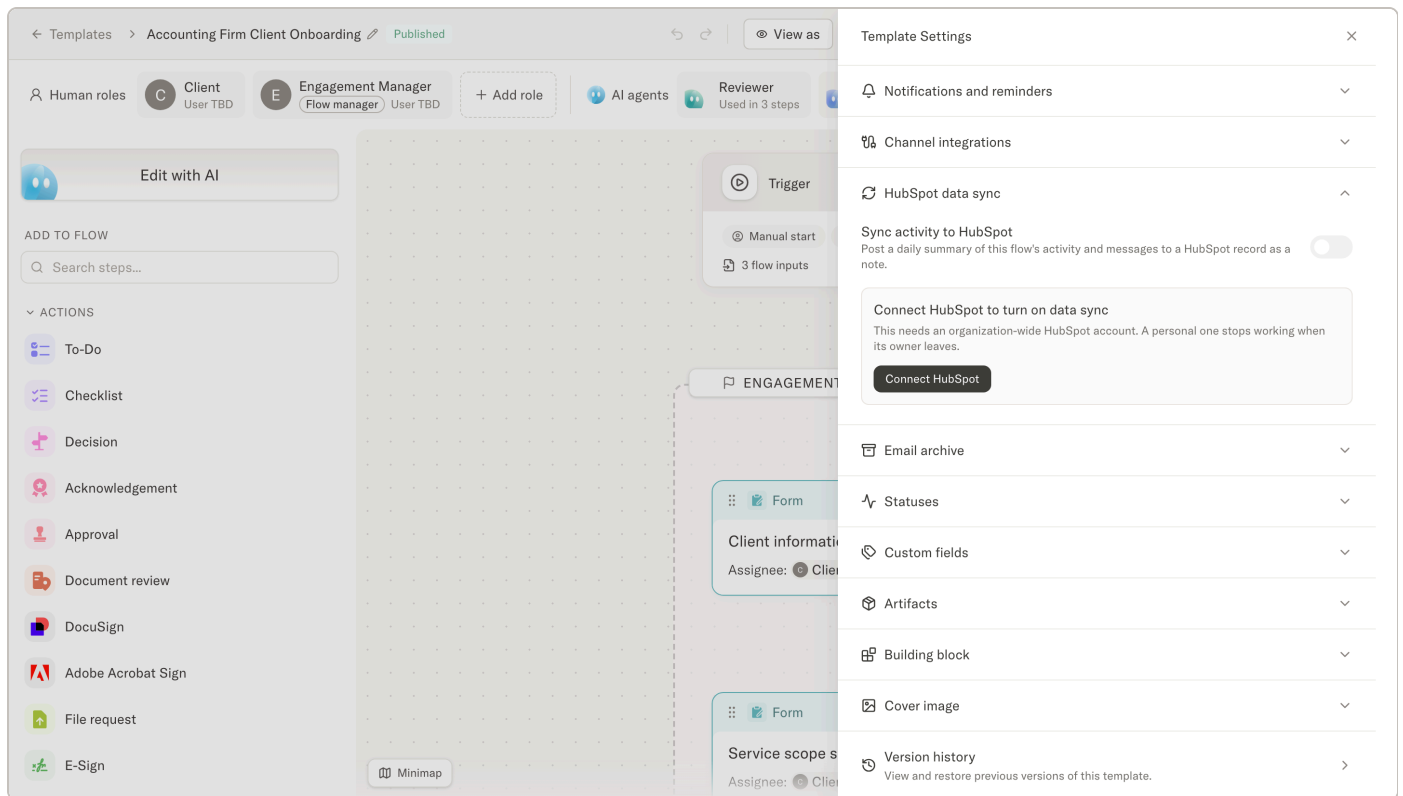
Action	What it does
Create or Update Contact	Creates a contact, or updates the existing one when the email matches.
Update Contact	Updates a contact by ID.
Find Contact	Looks up a contact by email and returns its ID and details, plus a match count you can branch on.
Find Contact's Deals	Returns every deal a contact is associated with, optionally narrowed to one pipeline.
Find Deals	Returns deals matching your filters as a list — every deal in a stage, or all deals owned by one person.
Create Company	Creates a company record.
Update Company	Updates a company by ID.

Action	What it does
Create Deal	Creates a deal in a pipeline and stage you choose.
Update Deal	Updates a deal by ID — including moving it to another stage.
Get Deal Info	Reads a deal's details by ID.
Create Ticket	Opens a support ticket. <i>Needs the ticket scopes.</i>
Update Ticket	Updates a ticket by ID. <i>Needs the ticket scopes.</i>
Get Ticket Info	Reads a ticket's details by ID. <i>Needs the ticket scopes.</i>
Link Records	Associates two records — a contact to a deal, a contact to a ticket, and so on.
Create Activity	Logs an engagement on the timeline: an email, call, task or note.
Upload File to Record	Attaches up to 25 collected files to a contact, company or deal in a single note.

Pipelines, stages and properties are read live from your connected account, so the dropdowns show your pipelines and your custom fields — not a generic list. Dates are converted between HubSpot's format and Moxo's in both directions, so you never handle timestamps by hand.

3.3 Post flow progress back to a HubSpot record

In **Template settings → HubSpot data sync**, switch the sync on and point it at a record. Every flow started from that template then posts a daily note to that record's timeline summarising the day's activity, and one closing note when the flow ends.



Template Settings → HubSpot data sync. Until an organization-wide HubSpot account is connected, the switch stays off and the panel offers the connect step instead.

- **Account** — must be an **Organization** connection. A personal one is listed but cannot be chosen: it stops working when its owner leaves, and a daily background sync would then fail silently.
- **Record type** — deal, ticket, company or contact.
- **Record ID** — type one in, or reference flow data such as `{Inputs / HubSpot deal ID}`, or the output of an earlier step that created the record.
- **Time and time zone** — when the daily note is posted. The time zone is seeded from your browser.

If nothing happened in a day, no note is posted. Internal staff notes are included — the CRM record is an internal system of record — while private assistant lanes never are. Moxo tells you both in the panel before you publish.

4 Use the app

Once a template is published, the integration runs on its own. Here is a complete example — a client-onboarding workflow that begins the moment a deal is won and finishes with the CRM updated.

The example

1 A deal reaches “Closed won” in HubSpot

The template's trigger is **Deal stage changed**, with a condition limiting it to the *New business* pipeline and the *Closed won* stage. Deals in other pipelines are ignored.

2 Moxo starts the onboarding flow, already filled in

The mapping names it `Onboarding – {Company / Name}`, makes the deal owner the flow owner, and assigns the *Client* role to `{Contact / Email}` — the contact associated with the deal. The contract value and target go-live date come across as input fields.

3 The client does their part

They receive a link, upload their documents, complete the intake form and sign the agreement. No Moxo account is required — a secure link is enough.

4 Your team reviews and approves

Approval routing can use the CRM data that came in — for instance, sending contracts above a threshold to a second approver.

5 HubSpot is updated as the work completes

An **Update Deal** step writes the onboarding status and go-live date back to the deal. An **Upload File to Record** step attaches the signed agreement to it. A **Create Activity** step logs a note on the timeline.

6 The account team follows along in HubSpot

With data sync on, the deal record gets a daily note — documents received, approval granted, contract signed — and a final note when the flow completes. Nobody has to ask for a status update.

Running it by hand

Automation is optional. A template that uses HubSpot actions can also be started manually, from a link, by email or by webhook. The HubSpot steps inside it behave identically — they use the same connection and the same mapped values, taking whatever data the manual start collected.

Keeping an eye on it

- Each flow's activity log records every HubSpot call the flow made and what it returned, so you can see exactly what was written and when.

- A step that fails — a deleted record, a revoked permission — is reported on the step with the reason, and can be retried. It does not silently pass.
- On the connection row in **Settings → Connected Apps, Test** confirms the credentials are still good.

A note on timing

Event-started flows arrive within seconds of the change in HubSpot. Data-sync notes are posted once a day at the hour you set, not in real time.

5 Disconnect the app

Disconnecting in Moxo severs the link from the Moxo side and discards the stored credentials. Do this when you want to stop the integration but keep your Moxo workspace.

1 Open the connection

In Moxo, go to **Settings** → **Connected Apps** and find HubSpot under **Connected**.

2 Click Disconnect

Confirm when prompted. The stored tokens are deleted immediately.

What happens to your data

Existing data will remain on your HubSpot records. Disconnecting is not a rollback. Specifically:

- Every contact, company, deal and ticket Moxo created or updated stays exactly as it is.
- Files attached to records, logged activities, and progress notes already posted all remain on the timeline.
- Moxo deletes nothing in HubSpot, on disconnect or at any other time.

On the Moxo side:

- Triggers using that connection stop starting flows, and Moxo's subscription to your account's events is released.
- Steps in published templates that used it report a broken connection rather than failing quietly. Flows already running are unaffected until they reach such a step.
- Data syncs pointing at that connection stop posting notes.
- Your templates, flows, mappings and history are all kept. Reconnecting the same HubSpot account and re-selecting it restores the configuration — nothing has to be rebuilt.

Who can disconnect

The person who made the connection, a workspace admin, or anyone holding the permission to manage credentials.

6 Uninstall the app

Uninstalling in HubSpot revokes Moxo's access from the HubSpot side. It is the definitive way to end the integration, and it works whether or not you have already disconnected in Moxo.

1 Open connected apps in HubSpot

In your HubSpot account, go to **Settings** (the gear icon) → **Integrations** → **Connected Apps**.

2 Uninstall Moxo

Find **Moxo** in the list, open its action menu and choose **Uninstall**. Confirm by typing `uninstall` when HubSpot asks.

HubSpot's own instructions, with screenshots, are in their knowledge base:

knowledge.hubspot.com/integrations/connect-apps-to-hubspot.

What happens to your data

Existing data will remain on your HubSpot records. Uninstalling revokes access; it does not undo work. Records Moxo created or updated, files it attached, activities it logged and notes it posted all stay on your records and timelines.

The moment the app is uninstalled:

- Moxo's access tokens for your account are revoked by HubSpot and stop working immediately.
- Your account stops sending events to Moxo, so triggers no longer fire.
- Any Moxo step that would call HubSpot reports a permission error instead of running.

We recommend also disconnecting in Moxo (section 5) so the workspace does not hold credentials that no longer work.

Reinstalling later

Connect again from **Settings** → **Connected Apps** in Moxo, exactly as in section 2. Templates that referenced the old connection need it re-selected; their mappings, conditions and steps are preserved.

7 Troubleshooting & support

If you see this	What it means and what to do
Ticket actions and ticket triggers are missing	Your HubSpot account did not grant the ticket scopes — usually because it has no Service Hub subscription. Add Service Hub, then reconnect in Moxo so the new permissions are picked up.
Custom objects or custom properties are not offered	The custom-object scopes were not granted, or your HubSpot edition does not include custom objects. Standard objects are unaffected.
A “Reconnect” prompt on the connection	Moxo needs a permission your existing token does not carry, or your HubSpot user's access changed. Click Reconnect and approve — your configuration is preserved.
A role was left unassigned	The mapped email property was empty on that record, or the mapping points at a property the object does not have. Open the trigger, use Load sample , and check what the mapping resolves to.
The flow did not start	Check that the trigger's toggle is on, that the template is published, and that the record actually satisfies the conditions. Conditions are evaluated against the record as it is after the change.
A HubSpot account is listed but cannot be selected for data sync	It is a personal connection. Data sync requires an Organization connection — see section 3.3.
No daily note appeared	Nothing happened in the flow that day, which is deliberate — Moxo does not post empty notes. Otherwise check the record ID still resolves to a record that exists.

Data handling

- Moxo reads only the records and properties your configuration references, and requests exactly those fields from HubSpot.
- Credentials are stored encrypted and are never shown back to any user, including workspace admins.
- Moxo writes to HubSpot only where you configured it to — an action step, or a data-sync note. It never deletes HubSpot data.
- You can end all access at any time from either side, as described in sections 5 and 6.

For our privacy policy, data-processing terms and security documentation, see moxo.com.

Getting help

Email	support@moxo.com
Product documentation	moxo.com/docs
In the product	The help launcher in your Moxo workspace

When reporting an issue with this integration, please include your Moxo workspace name, your HubSpot account ID, the template or flow involved, and roughly when it happened. That is usually enough for us to trace

the exact call.